TOOLBOX PROTOCOL COMMITTEE RECOMMENDATIONS

May 2005

The following information was taken from the "Single Point of Contact System (SPOC) section of the Business Outreach Plan.

"Toolbox is the WIB's recognized source for identifying the SPOC, tracking contacts and recording services delivered."

"It is the responsibility of the SPOC to: …Assist other One Stop system staff with appropriate and necessary communications to a given business when requested due to special initiatives, i.e. Hiring Initiative, Veterans' Career Fair. Such events add value to the regular delivery of System services.

"Toolbox is used to record SPOC activity with business customers to document services provided, record contacts, enter job orders, and otherwise manage activities provided by the Missouri Career Centers."

"Business Consultants should check Toolbox prior to visiting a business to determine who has previously contacted the business customer, when they were contacted, and what services, information and special instructions were entered."

"Proper utilization of Toolbox and the Single Point of Contact System will prevent unnecessary multiple visits from One-Stop partners."

Therefore the following recommendations are made regarding the utilization of the employer section of Toolbox.

Pulling up an Employer Record:

The preferred method of pulling up an employer record is by:

A. The Federal Employer Identification Number (FEIN), or
B. Their telephone #

Note: Pulling up a company's name may be listed differently then you expect. For example, "U S Gypsum" could be listed as "U.S. Gypsum", "U. S. Gypsum", "United States Gypsum",

Precaution – Before adding a new worksite, be absolutely sure it is not already in our system. Try accessing the employer record through **Staff Entered Employer Search.** Searches can be performed 7 different ways i.e.

- UI Account Number (exact match)
- FEIN (exact match)
- Worksite Name (partial match)
- Contact Last Name (partial match)
- Telephone (exact match, NO PUNCTUATION!)
- Legal Name (partial match)
- User Name (partial match - not case sensitive)

NOTE: You must enter at least three (3) digits.

Adding a New Employer Record:

You **must try at least three (3) different methods** of pulling up an existing employer record **before** adding a new worksite. (Master Record Search – Steve)

When adding a new worksite, you **must have**:

A. The FEIN, and
B. The correct spelling of the company's legal name (Do not use punctuation in the Employer Name.)

UI Account Number: This is the number assigned by Department of Labor that the employer pays their Unemployment Tax under. HR staff generally do not know this number.

Legal Name: REQUIRED = Enter the Business's legal name. Note: The business legal name might differ from the work site name.

FCJL Employer – (Federal Contract Job Listing - Karen)

Mandatory Employer – (Karen)

Ownership Options are:

Federal Government
International
Local Government
Private
State Government
Unknown

SIC Code – Standard Industrial Classification code - Click on the question mark to access this code or visit www.osha.gov. (Type "SIC" in the search box)

NAICS Code – North American Industry Classification System – Click on the question mark to access this code or visit www.census.gov. Type in "NAICS" in the search box.

> ***NOTE**: The NAICS Code will be replacing the SIC code, so if known, go ahead and enter it in now to make a smoother transition.

WIB Member: Workforce Investment Board Member – Signifies that employer serves on board.

MEC Member: Missouri Employer Committee Member – This will generally be entered by a staff person on the committee at the employer's request.

Employer Size: Ask the employer approximately how many employees they have at this worksite.

Is Account Active? Be sure system defaults to "Yes".

Duplicate employer records should be reported to DWD Supervisor or DWD Business Representative to forward request to delete duplication to Central Office.

Worksite Registration Screen:

Edit Special Instructions – Use this section to record information all staff should be aware of, such as the name of the SPOC for this employer and to make note if employer is open to job development contacts. Staff must check this section prior to contacting employer to ascertain that information.

Valid GH Employer – Indicates if employer is registered in Great Hires.

FCJL Employer/Mandatory Employer – FCJL stands for Federal Contractor Job Listing. It is mandatory that businesses list job openings with State agencies such as ours if their federal contract value is $100,000 or more. The employer can be a federal contract employer but not be mandatory if contract is for less than $100,000. If contract is more than this amount you also have to click on 'yes' for the Mandatory. In the new TB redesign this will be one button and written out to explain this.

Review **Activity Summary** for contacts previously made. Use discretion on how often an employer is contacted. Call the SPOC to discuss any current activity.

Contact List – Review the contact list to be sure you do not add a duplicate contact. When adding a new contact, or just talking with the employer, it is a good idea to review with the employer the contact names already in Toolbox. For any contacts no longer with the company, pull their record up and change their "Active Status" to "No". This will inactivate the record and keep our employer records up-to-date. Duplicate contacts should be reported to DWD Supervisor or DWD Business Representative to forward request to delete duplication to Central Office.

To enter a 'case note' (or 'employer contact'), click on the contact person's name to bring up the appropriate screen.

Adding an Employer Contact:

1. Click on the appropriate type of contact designation – typically it will be worksite.
   A. Worksite
   B. MEC – This employer has indicated an interest in being a member of the Missouri Employer Council.
   C. WIB – This employer serves on the local Workforce Investment Board.
   D. Other
   E. Wage Supplementation – This employer has a signed Wage Supplementation agreement
   F. Great Hires – Either the employer, or a business consultant while helping the employer, has registered this person into Great Hires.

2. User Name, Password Question and Password Answer – **DO NOT USE** – These are security items entered when the contact is registered into Great Hires.

3. Enter all required fields, note that selecting "Other" as the position title requires that you enter a job title in the following box.

4. Enter the contact's fax # and e-mail address, if applicable.

5. Be certain that 'active' status is defaulted.

Activity Summary (from Worksite Registration screen):

This activity summary will show all employer contact entries for all contact persons, but it does not tell you which staff member made the contact.

Detailed Contact Information:

To update information regarding an employer contact, click on their name at the Worksite Registration Page. If this is for a new employer contact, click on “Add Contact”. The next screen that appears will be the “Detailed Contact Information” screen.

You **must enter an activity for each contact you make with the employer**, i.e. phone calls, faxes, e-mail, visits, etc. Click on “Add Activity” to get the entry screen.

Adding a Contact Activity:

Activity Type options:

Employer E-mail Provider
Employer Telephone Provider (use this for fax also)
Employer Visited Provider
Flyer
Job Development Contact*
Letter
Other (use as last resort)
Provider E-mail Employer
Provider Telephone Employer
Provider Visited Employer

*__DEFINITION__: A **job development** is when staff contacts an employer regarding a particular job seeker when there is no open job order for the position the job seeker is qualified for. When entering a job development, you are required to enter the job seeker's SS# in the field provided and it is recommended that you include the customer's name in the activity description.

Activity Entry - In the activity box, summarize the contact. If obtaining a job order, note the job title in this field. Include follow-up information in this box. When entering an activity, follow the Who, What, When, Why and Where principle:

- Who – include others involved in the contact
- What – include what was discussed
- When – include relevant dates for events and predicted follow-up
- Why – include reasons as appropriate
- Where – include activity locations, i.e. stating the specific Missouri Career Center where an activity occurred, if applicable

Job Order Entry – From the top of the Worksite Registration screen, click on “Job Orders”.

The next screen that comes up is the **Job Order List** that will show job orders - open and closed – that were entered by staff.

The “**Job Order History**” screen will show those same orders but will list each time they were opened and closed.

The “**GH Job Order History**” will show all the job orders that were entered into Great Hires by the employer.

Before entering a new job order, **always check to be sure there is not already a job order open for the same position.** If not, but there is a closed job order for the same position, it is possible to ‘clone’ the order by clicking on the job title and updating each section. Be sure to update the ‘close date’.

Entering a new Job Order:
Click on the "**New Job Order**" link at the top of the Job Order List screen. It will bring up the **Contact Information screen**, partially completed with information from the employer record.

- Enter the employer's address, fax # and e-mail address (if applicable).
- You will need to indicate whether you want this job order to be open as:
  1. Qualified – Interested applicants will only see this order if their GH registration exactly matches the employers minimum qualifications
  2. Desired – Will match if applicants indicate interest in this type of work.
  3. Staff Assisted – General public cannot see job order.
- Do you want this job to be published on America's Job Bank? This will provide access nationwide. However, one problem is that AJB does not close job orders on a timely basis and it is not unusual to receive correspondence from job seekers long after the order is closed.

Job Order Details: Complete information. This will be used for matching purposes.
Work week – Choose one = Any, Full Time, Part Time, Intern, Seasonal, Temporary, PRN
Public Transportation - Accessible by bus?
Drivers License – If a Commercial Drivers License is required, indicate which endorsements are needed.

Edit Job Title:
Job Title for O*Net Mapping – This will be used by Toolbox to pull up job categories.
Job Title to be Displayed – This is the title requested by the employer for the job order.

Edit Tasks:

Select the appropriate level of skill required for the tasks required of this position –

Not Applicable
Employer Will Train
Education Only
3 – 6 months
6 months – 1 year
1 – 2 years
2 – 3 years
3 –5 years
5 – 7 years
7 –10 years
10 years or more

Edit Skills:
This is optional. If the tasks list did not list a specific skill needed, enter it here. For example, if a specific software program is needed or the applicant must speak a foreign language.

Publish Job Order:
Close Date will be the date you entered on the Details page.
If this order was cloned, you have the option of using the previous Job Order #.
# of Referrals will default to 100 or you can change it.

Job Order Description:

Give a brief description of the job duties and clearly state skills that are required for this position. Additional information provided could include the hours of the shifts (i.e. 6am-2pm), benefits available, etc.

It must be perfectly clear by instructions in the "**How to Apply**" section if job opening is **restricted in any way** to a particular set of applicants.

For those job orders **designed for clients who are enrolled in particular programs**:

1. On the first screen, the "Qualified, Desired, Staff Assisted" line may still indicate "Desired" to allow all potential clients to see the job opening if desired.
2. The "How to Apply" line must state "Contact Your Local Career Center".
3. The instruction box must include verbiage indicating this opening is for clients that qualify for subsidized employment. If so, the 'how to apply' section should contain the phrase "client / customer must be eligible for subsidized training". Also include information if the order will be open to all candidates after a certain date, such as for a subsidized training job order, if the job order is not filled by the 10^{th} business day, it is to be opened to the public by the WDE who entered the order into Toolbox.

H2B Job Orders – This is a job order generated by the Foreign Labor Unit at DWD in Jefferson City. An employer has contacted them stating that he cannot find any citizens qualified and willing to accept his job opening, therefore he would like to open the job order up to individuals from other countries. This is a federal program instituted to protect US workers. The following guidelines have been put in place.

1. All H2B job orders must be entered into Great Hires by the Foreign Labor Unit. The job order must run for ten (10) consecutive days.
2. The Career Centers need to provide a place for the employer to conduct interviews. The Foreign Labor Unit will coordinate scheduling with DWD staff. (If the Career Center is not able to schedule a place for the interviews, the employer is required by federal law to send a certified letter to each referral.)
3. The instruction box under 'How to Apply' will state that individuals need to report to the appropriate Career Center at a particular date/time for an interview. Any staff providing referrals need to be sure that these are interviews not just applications. If you know that a referred client cannot make the date/time of the interview, e-mail the Foreign Labor Unit with the information and they will ensure the employer sends them a certified letter and phone call.
4. DWD staff must 'result' the referrals once the employer has completed the interviews indicating who was hired (if applicable), who did not show, etc. This **could affect the benefits for program clients** (METP, CAP, etc) if they do not show to the interview. It is **very important** that you explain this to anyone you are referring to the H2B job order. It is imperative that every US worker who shows for an interview is verbally offered the job. A "not hired" result means the employer disqualified a US worker and his application for foreign workers will be denied, so staff must use extreme caution when entering results.

Job Order Match:

1. Once you have published the order, click on “Job Order Match” to find qualified job seekers.

2. A list of job seekers will appear indicating how closely matched they are to the job order, i.e. 100%.
3. Click on ‘SBS’ (Side-by-side) to determine if the client would be a good candidate for the job. NOTE: DWD staff should give preference to Veterans.

   Use the back arrow to return to list.

4. Put a check mark in the Call In box for the clients you have determined qualified. These clients will receive a computerized call instructing them to call the Career Center generating the call. Keep in mind urgency of order and staff workload when deciding how many calls to send out.

Return Calls:

When clients return calls they received from the computerized call-ins, ask for and pull up their record by the telephone # we called.

Click on “Pending” to bring up the match.

Click on “SBS” to read the description of the job order to the client. If they are interested and truly qualified, give them instructions on how to apply and post the referral. NOTE: If the “Post This Referral” option is not available, client does not have a SAR. You will need to backtrack and put in the SAR before you can post the referral.

You can also find the information from the client’s main page by clicking on ‘call-ins’.

Once posted, the referral can be found from the client’s main page by clicking on “referrals”.

Posting Referrals:

Referrals can either be posted from the job order or from the client’s record.

To post a referral for a known job order from the client’s record, click on ‘referrals’, enter the job order # and click on “Show Me SBS”.

To post a referral from the job order screen, enter the job order # and click “Go”.

Enter the SS# for the client and click “Submit”.

This screen can also be used to look up Call-ins and clients previously Referred to the Job Order.

Posting Results to the Job Order:

If the job order is still open, pull it up and click on “Referrals”.

For each entry on the referral screen, click on the appropriate entry, then click “Post Results”. **NOTE: This is how we get credit for hires, so it is very important!**

If the job order is closed, click on “Result Referrals”. This will bring up the list of referrals and you can proceed as above.

A third option is to pull up the Referral screen from the client’s main screen.

Click “Result” for the appropriate referral. Select the appropriate result and save.

General Recommendations by Committee:

- Recommend that an effort be made to collect information from employers regarding position titles employed at each company. This could be a valuable job development tool.
- A recommendation was also made to seat partner staff involved in similar work near each to enhance communication.
- A third recommendation was made that all partners attend regularly scheduled interagency meetings to discuss, among other items, employer concerns and activities.

Special Note of Thanks to Ivory Johnson, Independence Career Center, for stepping in and representing FEC at our first team meeting.

Participating Committee Members: Debby Price, Chair; Steve Dempsey, Karen Yarbrough, Jan Winter and Deborah Moore